



## DEPARTMENT OF EDUCATION

**SUBJECT:** Menu Production Record Forms and Instructions  
for NSLP/SBP Food Based Menu Planning  
NSLP – 9A

**TO:** Authorized Representatives  
National School Lunch Program

**FR:** Sandra Kangas, Director  
Child & Adult Nutrition Services

**DT:** December 9, 2002

This memo replaces the production record forms portion of NSLP Memo-9 (July 24, 1996). The Menu Production Record form prototype has been updated to reflect the addition of established age/grade groups depending on which menu planning option the school is implementing.

An important step in Food Based Menu Planning is determining the age/grade group(s) that will be served and selecting the correct menu planning option. The age/grade groups are designed to reflect the differing needs of younger and older children while also accommodating the grade structure of the majority of schools.

For school-age students (grades K-12) both Traditional and Enhanced Food Based Menu Planning options use two established age/grade groups for lunch and one established age/grade group for breakfast. If the school's grade structures do not match the established groups, it can easily be determined how to group grades by following the information outlined on page 69 of the Menu Planner for Healthy School Meals, USDA, FNS –303,1998. Contact the state agency for clarification to ensure that the correct established age/grade groups for your menu planning option are being used if there are questions.

### PRODUCTION RECORD PROTOTYPES

Prototype menu production record forms for breakfast/snack and lunch are included for each food based menu planning option along with completed examples. The blank forms should be copied for use as needed. Complete the menu production record form by following the Menu Production Record Instructions provided in this memo. Forms and instructions are also available on the CANS website at <http://www.state.sd.us/deca/CSCF/CANS/> under Forms and Documents, Numbered Memos, NSLP 9-A. It may be downloaded and used in electronic form. This would be especially useful for cycle menus.

These new prototype forms will help schools to use the correct established age/grade groups based on the menu planning option they have indicated in their annual Child Nutrition Program

Agreement. This is important in order to meet the requirements set forth in the Healthy School Meals Initiative.

### HOW DO I KNOW WHICH PRODUCTION RECORD TO USE?

Schools implementing Traditional Menu Planning, will use the production record prototype that says “Traditional Menu Production Record” at the top of the form and uses the established grade groups of K-3 and 4-12. Schools implementing Enhanced Menu Planning will use the production record prototype that says “Enhanced Menu Production Record” at the top of the form with the established grade groups of K-6 and 7-12. Each production record prototype is specific for the age/grade groups to be used in that particular menu planning option.

Schools using the Nutrient Standard Menu Planning option may use the production record available in their USDA approved software program with state agency approval, or use the “Enhanced Menu Production Record” prototype form.

The breakfast/snack prototype may be used for all menu planning options for breakfast, as the established age/grade group of K-12 is the same for each option. Schools implementing Snack After School may choose to use this production record as well to document their snacks offered.

### DO I NEED TO USE THE STATE PRODUCTION RECORD PROTOTYPE?

Production records provided in this numbered memo have been designed for use by schools in South Dakota. These forms meet the requirements set forth by USDA and Child and Adult Nutrition Services (State Agency). Whether the prototype production record forms enclosed with this memo are used is not critical, as long as all of the required information is collected and the correct age/grade groups are used. Any changes to the enclosed prototypes, or implementation of a different form, must have state agency approval prior to implementation. Remember, production records are required by regulation and must be implemented for all feeding sites where child nutrition meals are served. For every breakfast, lunch or snack offered, a production record must be completed.

### MULTI-DAY FOOD BAR PRODUCTION RECORD

Schools implementing a daily food bar with several choices may consider using the Multi-Day Food/Condiment Bar production record. Contact Child & Adult Nutrition Services for more information and a sample copy along with a completed example and instructions. Also refer to SD numbered memo NSLP-76.

### DOCUMENTING CHILDCARE MEALS WITH THE NATIONAL SCHOOL LUNCH PROGRAM

If the school is providing meals to a childcare center with ages 3-5 or has a childcare center with ages 3-5 as part of its program, meals may be documented on the same production record as school lunch meals under certain circumstances. Childcare meals may be documented on the same school lunch production record IF the menu items and serving sizes are the same as offered to the students in the school. If only serving sizes differ, another column to the production record could be added to record the correct serving size and number of planned servings for the childcare or use the CACFP production record. If menu items and serving sizes are different between the childcare and the school students each day, then the childcare meals should be maintained separately on the CACFP production record for clarity.

## EXAMPLES

	Use NSLP Production Record	Use NSLP Production Record & Insert additional column	Use CACFP Production Record
If menus & serving sizes are the same	<b>X</b>		
If menus are the same but serving sizes are different		<b>X</b>	<b>X</b>
If menus <u>and</u> servings sizes are different			<b>X</b>

## PRODUCTION RECORDS FOR CACFP AND SFSP

Production record prototypes specifically developed for use in the Summer Food Service Program (SFSP) or the Child & Adult Care Food Program (CACFP) are NOT acceptable for use in the National School Lunch Program (NSLP) or School Breakfast Program (SBP). If your agency implements both the NSLP and the CACFP or SFSP, it is recommended that the NSLP production record (or approved alternate) be used for both programs. Using this prototype for both programs will maintain consistency in recordkeeping throughout the implementation of these programs. Copies of acceptable prototypes in the separate operation of the CACFP or SFSP may be obtained by contacting the Child & Adult Nutrition Services office or referring to the CACFP numbered memo 3A or SFSP numbered memo 33. Due to menu analysis, more detailed information is required in the NSLP and SBP records that is not needed in SFSP and CACFP.

## MAINTAINING PRODUCTION RECORDS WHEN SATELLITING MEALS WITHIN THE SCHOOL DISTRICT

School Food Authorities that satellite meals to schools within their own district must maintain documentation of meals served on a production record. It would also be recommended that the menu, quantities of foods provided and serving sizes for each food item be included with the delivery of these meals to each school. This enables a double check to ensure that all food items required at each site are provided. If individual packs are satellited, then the number of packs provided to the school as well as number of each choice of milk would be included on the packing slip. The production record would include the total quantities of foods prepared for all the satellited sites along with the number of individual packs provided. If food is bulk satellited, the packing slip should include the quantity of foods provided and the indicated serving size for each food item. The production record would then include the total quantities of each food item prepared and satellited along with serving sizes for each food item.

## MAINTAINING PRODUCTION RECORDS WHEN CONTRACTING MEALS

- Contracting with another school

Schools that contract to provide meals to another agency must maintain documentation for the agency receiving the meals for purposes of reimbursement and menu analysis. This documentation may be maintained on the same production record as the school providing the meals IF the menus and serving sizes provided to the agency are the same as the menus and serving sizes provided to students at the school providing the meals. However, if different menus

and serving sizes are provided to the agency receiving meals, then a separate production record needs to be maintained with adequate documentation to support meals claimed for reimbursement and conduct a nutrient analysis when requested by the state agency.

When providing meals to another agency, it is recommended that at a minimum some kind of documentation such as a packing slip be given to the agency receiving meals each day a meal is provided. The packing slip should state the menu, quantities of each food item provided and the portion size for each food item. Although this method is not required, it is a good business practice to implement some kind of procedure to provide this documentation. This helps the agency receiving the meals to be assured that they are receiving the correct meal pattern and serving sizes each day and provides documentation that the agency providing meals met meal pattern requirements to substantiate the billing.

- Contracting with a Food Service Management Company

The Food Service Management Company (FSMC) is responsible for complying with all the requirements in this memo. It is the School Food Authority's (SFA) responsibility to monitor these requirements for compliance.

#### HOW LONG DO I NEED TO KEEP THESE RECORDS?

Information supporting documentation on the production record such as standardized recipes, nutrient information for food products, menus, etc. must be retained in files at the local level for 3 years plus the current year, the same as for all other program materials used in the implementation of the child nutrition programs. SFAs contracting for meals must cover record retention in their contract.

Do not hesitate to contact Child and Adult Nutrition Services at 773-3413 should you have any questions.

# Menu Production Record Instructions

Use the production record for your specific menu planning option and appropriate age/grade group(s). Complete one production record for breakfast and one for lunch. If your agency participates in Snack After School, a production record must be completed as well. All sections of the menu production record must be completed to provide adequate documentation for USDA reimbursement. Sections A through G should be completed prior to the date the meal is served. Sections H and I are completed after the meal is served. Any changes to the prototype forms, or use of a different form, must have state agency approval prior to implementation.

**Section A:** Record/paste in the daily menu with the planned serving sizes for required age/grade group.

**Section B:** Record the food item and form it comes in i.e., frozen, canned, fresh, etc. or the recipe number of the recipe that was used. The product code number of a branded product could also be recorded here or in Section G. For example, Tony's Pepperoni Pizza #3456. It is very important to be specific in this section. Record items such as condiments and non-creditable foods in the "other items" section.

**Section C:** Record the serving size and number of planned servings for each age/grade group in this section. Do this for each food item. Remember that serving sizes for grains/bread items need to be recorded in ounces or grams. Be sure to read labels and weigh or calculate servings for homemade grains/bread items.

**Section D:** This column is for recording planned second servings offered as part of the meal with no extra charge. For example, if second milks or other food items are offered at no charge then record serving size and planned servings in this column. Record planned seconds by grade group. If second servings of milk or other food items are purchased, then this is considered a la carte and must be recorded in Section E.

**Section E:** Any a la carte items and adult meals are to be recorded in this column (extra items, second meals/milk sold, meals for teachers, food service workers, guests, etc.).

Consider the following when forecasting or planning the number of servings: ♦ Review planned menu and consider student preferences ♦ Evaluate menu item choice options ♦ Consider whether offer versus serve is implemented ♦ Check previous menu production records for number served ♦ Review school calendar for special events that may increase/decrease participation

**Section F:** Record the total number of servings forecast/planned by adding each "Planned Servings" column in Sections C, D, and E. Review the planned serving sizes to ensure the total number of servings needed is correctly determined. For example, if serving sizes are not the same for everyone, some calculation will need to be completed in order to determine adequate quantities to prepare.

**Section G:** Determine the total quantity needed and record specific amounts (number of cases, pounds, #10 cans, # of recipes, etc., product code number of branded product if not recorded in Section B). The yield factor or number of times the recipe is planned to be made, such as 100 X 2, can be recorded here only if the recipe is standardized and followed exactly as written. If ingredients are altered in any way from the recipe number indicated in Section B, such as substituting, eliminating, or adding ingredients, then actual ingredients and quantities to meet the meal pattern must be recorded. Review the serving sizes planned for each food item to ensure that total quantities needed are correctly determined.

**Section H:** Record any amount added to the planned quantity by marking (+). For example, +5#10 cans. Record food items left over by marking (-). For example, - ½ #10 can.

**Section I:** After the meal has been served, check with the cashier for final meal counts by your established age/grade groups. Record the total number of meals served by age/grade group and total number of adults (teachers, food service staff, guests, etc.) served.